

## Benefits Conferences

List of Topics and IRS/Treasury Speakers Involved  
as of 6/21/04

### Completed Benefits Conferences

	17th Annual Cincinnati Employee Benefits Conference	Northeast Area Employee Benefits Conference	Mid-Atlantic Area Employee Benefits Conference	Great Lakes Area Employee Benefits Conference	Los Angeles Benefits Conference	SWBA/IRS 14th Annual Employee Benefits Conference	Mountain States Benefits Conference
Web site link for further information	<a href="#">2004 CEBC</a>	<a href="#">2004 NEBC</a>	<a href="#">2004 MABC</a>	<a href="#">2004 GLBC</a>	<a href="#">2004 LABC</a>	<a href="#">2004 SWBABC</a>	<a href="#">2003 MSBC</a>
Dates	6/17/04 - 6/18/04	6/10/04 - 6/11/04	5/24/04 - 5/25/04	4/29/04 - 4/30/04	1/29/04 - 1/30/04	10/15/03 - 10/16/03	9/11/03 - 9/12/03
Location	Cincinnati, OH	Framingham, MA and White Plains, NY	Philadelphia, PA	Chicago	Universal City, CA	Dallas, TX	Denver, CO
Topic/Speaker	IRS EP Headquarters Presentation Shultz, Pippins	Washington Update/Late Breaking Developments Gold, Shultz	Washington Update Shultz, Gold	Washington Update Pippins, Hoffman	Washington Update Shultz	Washington Update Gold, Shultz and Reeder (Treasury)	Washington Update Gold and Shultz
	EPCRS Kahn	EPCRS Mak, Pustulka	EPCRS Feldman and Brim	EPCRS Kahn	EPCRS Bhagat	EPCRS Bond	EPCRS Bhagat
	National IRS Examination Program & Update/IRS Examination Strategies Templeman/Hayden	Enforcement Activities Butcher		Examinations and Audit CAP/Preparing your client for an IRS Audit Butcher, Templeman/Templeman		IRS Focus On EP Examinations and Audits Petit and Sanchez	
		DB Plan Issues Holland, Shultz	Plan Design Holland	DB Design Issues Milling	DB and/or Cash Balance Plan Design Kimlin	Cash Balance Plans - What's Next? Holland	DB Plans for Dummies Holland
		Defined Contribution Plan Design Holland, Shultz		The Latest on 401(k) Hoffman	401(k) Regs. Hoffman (Counsel) and Shultz	401(k) Guidance Reeder (Treasury)	401(k) Guidance Kuehnle
			412(i) Holland	Aggressive Tax Practices Sweetnam (Treasury)	Aggressive Tax Practices Pippins, Holland and Hoffman (Counsel)	IRS Focus on Abusive Practices Holland	Aggressive and Questionable Practices Holland
					Mergers and Acquisitions Holland and Pippins		Mergers and Acquisitions Holland
			Q&A Panel Feldman, Holland, Pippins, Shultz		Ask the Experts Holland, Hoffman (Counsel), Pippins	IRS Area Office Panel Hansen, Bond, Petit	Ask the Experts Bhagat and Kuehnle
	403(b)/457 Exam Nuts & Bolts Templeman and Smith		403(b)/457 Plans Architect and Press			403(b)/457 Plan Update Architect and Davis	403(b) and 457 Plan Update Architect
						IRS Focus on DL Program Shultz	Plan Document Updates Noe
			401(a)(9) Pippins				
					IRS Guidance Shultz/Holland and Hoffman (Counsel)	IRS Focus on Hot Topics Shultz and Holland	
	IRS Local Office Presentation Bell, Contreras, Miceli		Local IRS Reminders Jones		IRS Q&A Shultz, Pippins and Holland		
					Non-Qualified Deferred Compensation Plans Misner (Counsel)	Executive Compensation Misner (Counsel)	
							Health Reimbursement Arrangements Beker (Counsel)

	<b>Controlled &amp; Affiliated Service Groups</b> Pippins			<b>Actuarial Issues</b> Holland and Kimlin	<b>Managing Compensation \$&amp; Benefits Programs for "Troubled" Plan Sponsors</b> Shultz and Holland	<b>Fiduciary Duties</b> Gold
	<b>Minimally Invasive Procedures for Every Plan Administrator</b> Gold			<b>Large Plan Audit Team</b> Hoffman (IRS) and Morton	<b>Can Employers Still Afford Health Care Benefits?</b> Beker (Counsel)	<b>Service Provider vs. Plan Sponsor</b> Shultz
	<b>Distribution Planning</b> Pippins		<b>Recent Court Cases</b> Templeman	<b>Controlled and Affiliated Service Groups</b> Holland and Pippins		